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Annual Fac

METRO Magazine

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SPECIAL EDITION $25

1986-87 FACT BOOK

Bus & Chassis Manufacturers
Component & Service Suppliers
Railcar Manufacturers
Consultants & Industry Statistics

METRO® Magazine
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Annual Fact Book 1986-87

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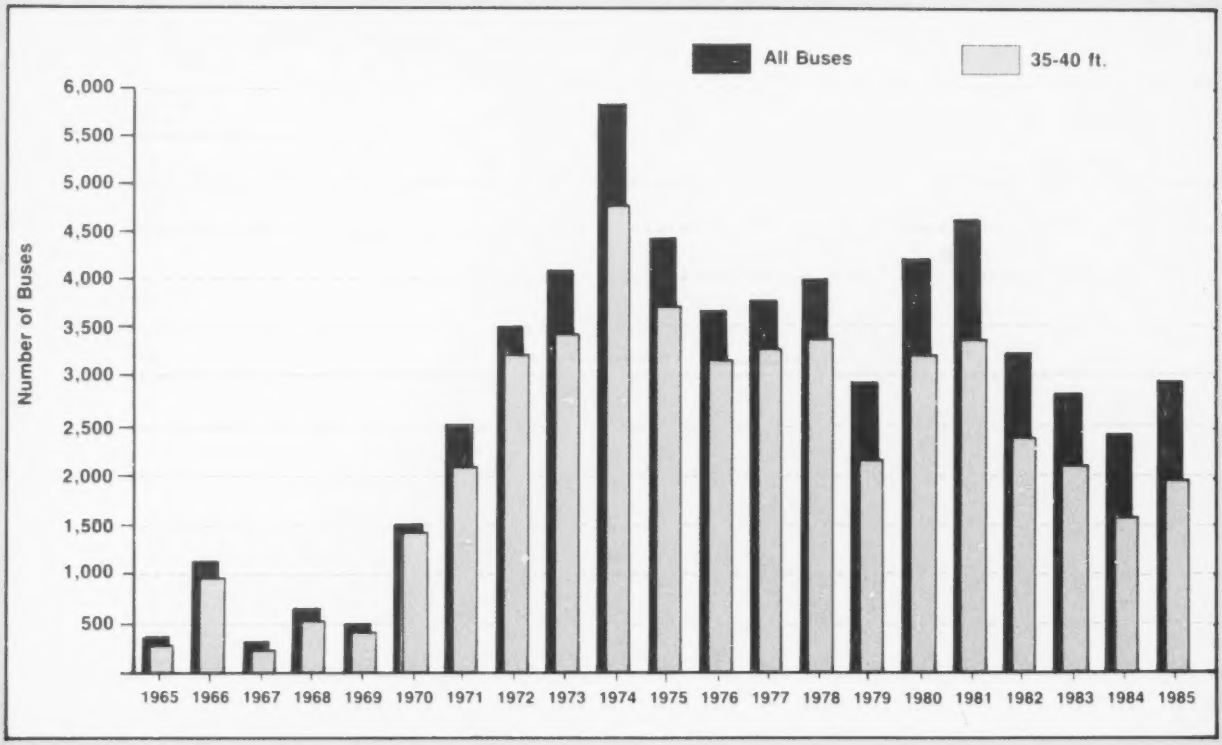
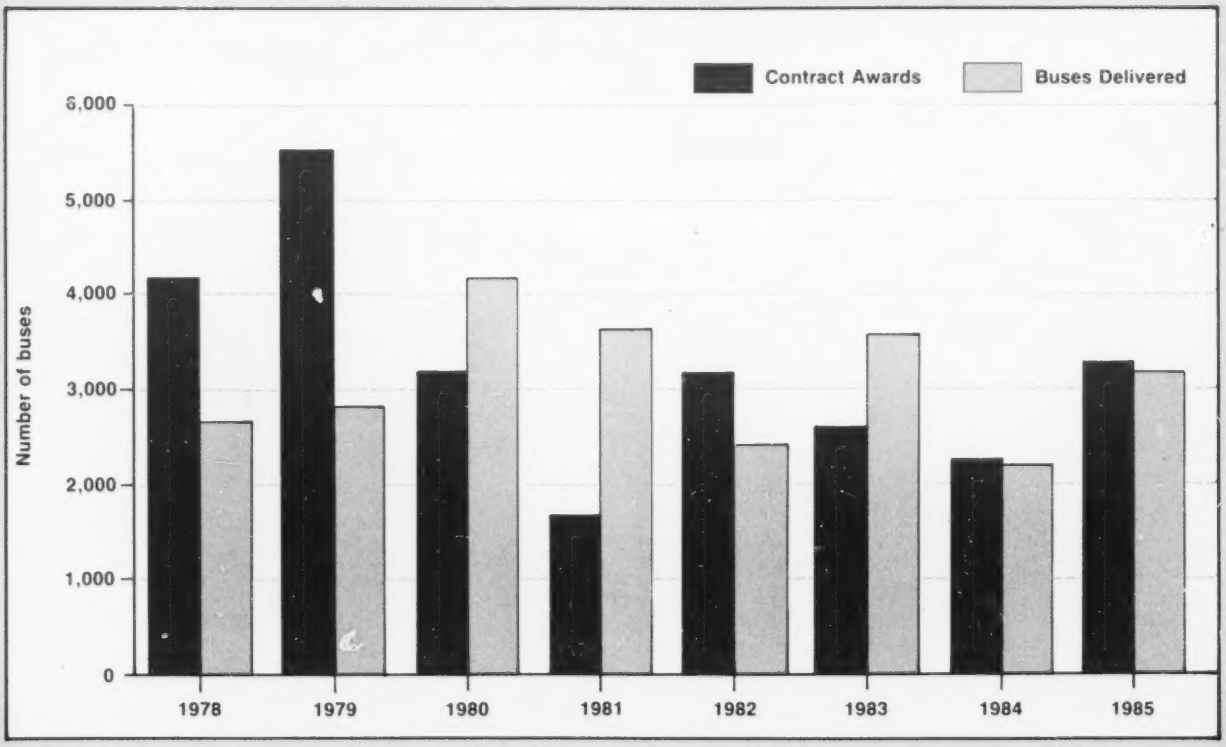
UMTA Funded Transit Buses 1965-85



SOURCE: Urban Mass Transportation Administration

Standard Transit Bus Awards vs. Deliveries 1978-85



*SOURCE: American Public Transit Association *The Flxible Corporation*

The Intercity Bus Industry in the United States

(Class I, II and III Carriers and Intrastate Carriers)

	1970	1974	1980	1981	1982	1983	1984	1985	1986*
Number of operating companies	1,000	950	1,330	1,470	1,520	2,300	3,254	3,588	3,669
Number of buses	22,000	21,000	21 400	21,500	22,000	23,500	20,100	20,200	—
Number of employees	49,500	49,400	49,100	49,200	49,500	50,000	44,100	43,100	—
Total bus miles (millions)	1,209	1,195	1,162	1,134	1,115	1,120	1,016	993	—
Total revenue passengers (millions)	401	386	370	375	370	365	352	352	—
Charter and tour passengers (millions)	92	131	195	205	208	210	N/A	N/A	—
Total revenue passenger miles (millions)	25,300	27,700	27,400	27,100	26,900	26,500	24,600	23,800	—
Operating revenue (millions)	$901.4	$1,515.9	$1,943.0	$2,068.7	$2,103.1	$2,211.3	$1,913.6	$1,879.0	—
Operating expenses (millions)	$812.2	$1,070.0	$1,810.9	$1,956.1	$2,044.3	$2,167.1	$1,895.5	$1,814.3	—
Net operating revenue (millions)	$89.2	$81.9	$132	$114.7	$57.1	$15.6	$18.1	$64.7	—
Operating ratio	90.1	92.9	93.2	94.6	97.2	99.2	99.1	96.6	—

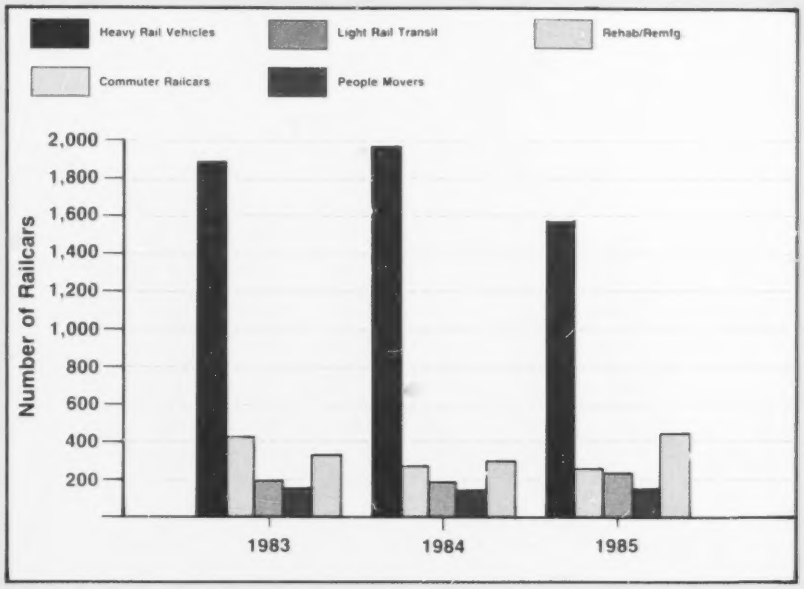
*As of June 30, 1986 Source: ICC • Source: American Bus Association

(Class I Carriers only)

	1970	1974	1980	1981	1982	1983	1984	1985
Operating companies	71	81	46	46	48	49	51	51
Number of buses	10,158	9,885	8,427	7,819	7,465	7,219	7,245	7,146
Number of employees	34,383	35,621	30,950	31,170	29,170	25,890	25,500	24,000
Total bus miles (millions)	870.9	885.6	771.2	734.9	707.8	614.5	609.5	576.5
Revenue passengers (millions)	174	168.7	132	123.3	109.7	98	92.1	89.8
Charter & Tour (millions)	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Revenue passenger miles (millions)	17,900	19,500	17,000	15,730	16,070	14,100	13,420	12,540
Operating revenue (millions)	$721.7	$932.6	$1390.4	$1465.8	$1435.3	$1317	$1299.2	$1251.1
Operating expense (millions)	$639	$858.7	$1311.1	$1392.8	$1406	$1321	$1290.6	$1187.4
Net revenue $ (millions)	$82.7	$73.9	$79.3	$73	$29.2	($3.5)	$8.6	$63.7
Operating ratio	88.5	92.1	94.3	95	98	100.3	99.3	94.9

1986 Railcar Backlog

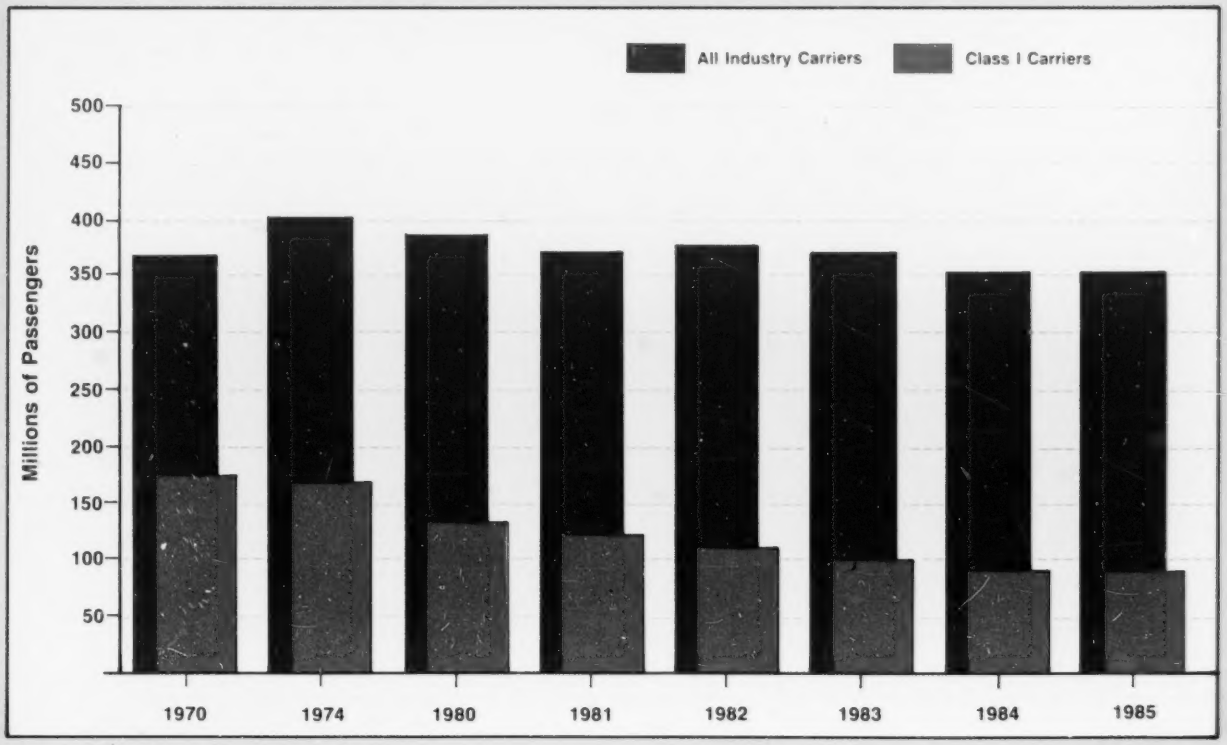
The third annual *METRO* Magazine Railcar Backlog Survey (see chart right) conducted earlier this year revealed that a total of 2,187 vehicles, worth $1.9 billion, are on order from North American rail transit properties. The survey showed a decline of approximately 19% from 1985's totals of 2,676 railcars and $2.7 billion worth of contracts. This follows a 26% decline from the preceding year.



SOURCE: Bobit Research Department

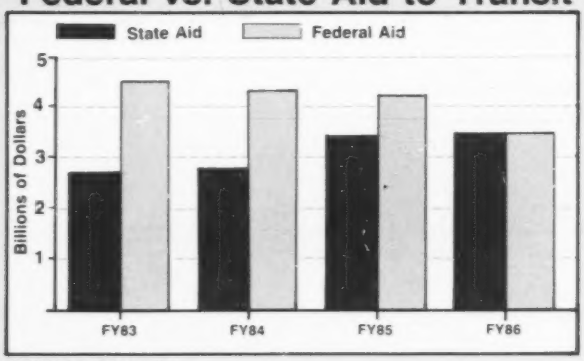
Meanwhile revenue passengers among Class I intercity/tour bus operators (see chart below) is continuing a downward trend too. This loss can be attributed to three principle factors: 1) massive defections by regular route riders to low cost airlines, 2) a continuing reduction of Class I carriers, to 51 carriers in 1985 from 71 in 1970, and 3) the long-term trend, first seen in the early 1960s, toward tour and charter riders.

Intercity/Tour Bus Revenue Passengers



SOURCE: American Bus Association

Federal vs. State Aid to Transit



SOURCE: AASHTO

State funding for public transportation in fiscal year 1986 is equal to the amount contributed by the federal government, according to the "1986 Survey of State Involvement in Public Transportation" conducted by the American Association of State Highway and Transportation Officials (AASHTO).

The figures show that while federal transit contributions under the Reagan Administration decreased to $3.5 billion in FY86 from $4.5 billion in FY83, state aid rose almost an equal amount—to $3.5 billion in FY86 from $2.7 billion in FY83. Thus as the federal government has scaled back its involvement in public transit, state governments have stepped into the breach with funding of their own.

State funding can be divided into two categories, direct and indirect aid. Direct aid, which accounts for approximately 71%, is generated by a state-level tax and returned to transportation agencies with the states in the form of state grants. Indirect financial assistance, which accounted for about $1 billion in FY86, is a tax or revenue generating program adding to the existing state tax. These funds are not administered at the state level, but are distributed by local transit authorities mainly in urban areas.

State	Fiscal Year 1985-86
1. New York	$1,008,352,000
2. California	599,446,000
3. Pennsylvania	310,000,000
4. Massachusetts	231,700,000
5. New Jersey	221,700,000
6. Maryland	211,881,000
7. Illinois	173,400,000
8. Georgia	142,725,000
9. Washington, D.C.	104,700,000
10. Michigan	89,369,000

These state taxes and revenue programs are appropriated from a variety of sources including the state general fund, the transportation fund, sales tax, fuel tax, lottery revenues, cigarette tax, turnpike revenues, the sale of bonds, etc.

The survey was conducted in all 50 states and the District of Columbia and Puerto Rico by the Standing Committees on Public Transportation, which are the state entities of AASHTO. Forty-four of the 52 respondents are providing state financial assistance for public transportation in 1986, compared with 40 in 1983.

Eyes for the Back of Your Bus

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The INTEC system is made with heavy-duty construction, and consists of a weatherproof camera mounted on the back of the bus, and a video monitor installed in the cab area. This allows the driver to see directly behind and a lane to either side for safety while changing lanes, pulling into traffic, or backing into the parking space at the end of the day. The system instantly switches "on" whenever you shift into reverse. And, our Day/Night switch increases contrast for improved nighttime visibility. All controls are located on the front of the monitor, within easy reach of the driver.

INTEC's Car Vision System provides an unobstructed view, so you know exactly what's on either side and in back of you. In addition, INTEC gives you more for your money, and is the most technically advanced video safety system available in its price range. Our warranty is unmatched and our service is the finest in the industry.

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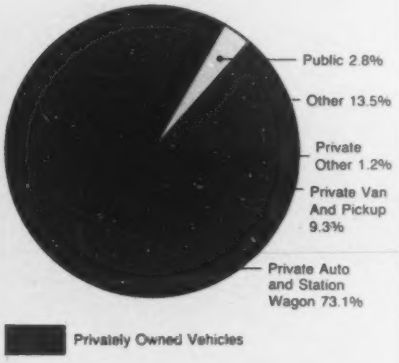
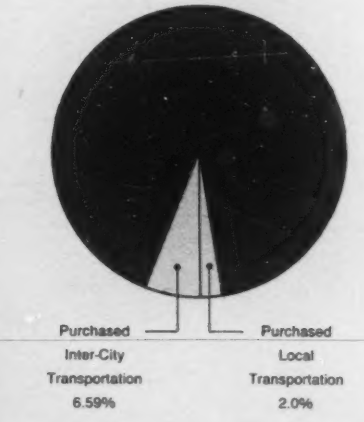
Person Trips by Transportation Mode, 1985

Only 2.3% of all private transportation trips are by public transit (including bus and rail transit), 0.5% are by train, airplane and taxi, 13.5% are by bicycle, school bus and miscellaneous other modes, and 83.6% are by private automobile and light truck.



Personal Expenditures by Transportation Mode, 1985

Meanwhile, user operated transportation — meaning automobiles, light trucks, passenger vans and motorcycles — consumed more than nine-tenths of all personal expenditures by consumers on transportation, with purchased local (transit & taxi) and intercity (bus, airline & rail) transportation accounting for the rest.



SOURCE: MVMA

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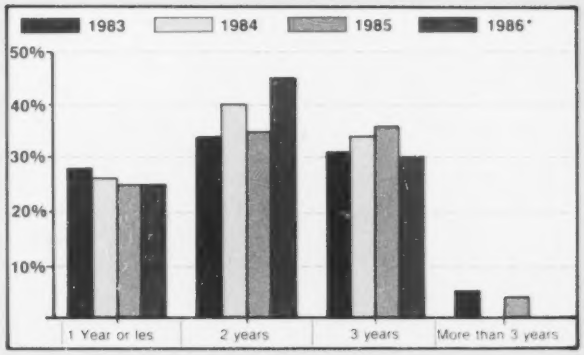
Labor Trends in Transit†

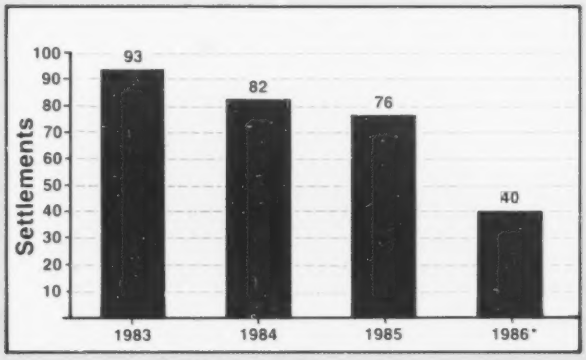
Labor traditionally consumes about 70% of every dollar spent in the public transit industry. These charts show several important labor trends. Chart 1 shows the number of labor settlements represented by these data; while all transit labor settlements are not shown, labor negotiator Tom Hock of ATE Labor Services estimates more than 80% of all unionized transit workers are represented by the number of settlements shown. Chart 3 reveals a slight move toward one and two year contracts, away from three-year-and-longer contracts. Chart 4 indicates that hourly pay increases won by rank and file tend in the 21- to 60- range, with the 21- to 40- range growing yearly. Finally, Chart 5 shows that over the last three years transit labor settlements have tracked inflation, outpacing it slowly.

Chart 3.
Contract Division



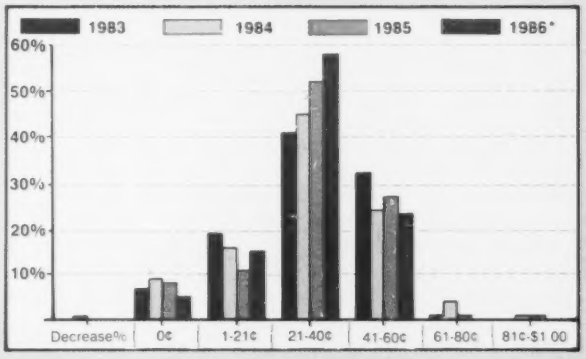
* January 1, 1986 to June 30, 1986

Chart 1.
Number of Settlements



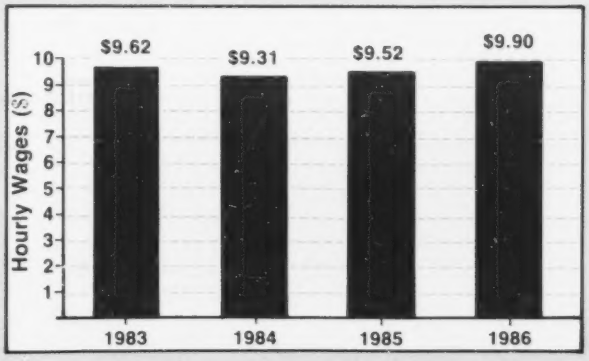
*January 1, 1986 to June 30, 1986

Chart 4.
Wage Changes By Year
(in cents per hour)



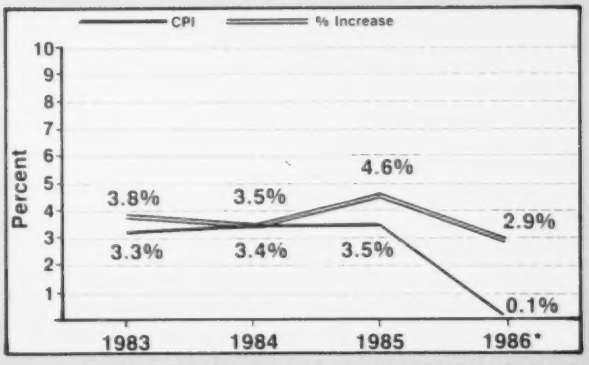
*January 1, 1986 to June 30, 1986

Chart 2.
Average Top Operator's Rate - prior



† *SOURCE: ATE Labor Services, Inc.*

Chart 5.
Average Percent Increase Per Year of Contract vs. Consumer Price Index@



@ CPI refers to Urban Wage Earners & Clerical Workers, Revised Series
SOURCE: Bureau of Labor Statistics